



Case Study: DecisivEdge Delivers a \$2.8M Impact for Behavioral Health Provider

CHALLENGE

Salesforce is a powerful, sophisticated platform capable of driving businesses to new heights when implemented optimally. However, for a large behavioral health organization operating 14 addiction recovery centers across the U.S., their Salesforce investment fell short of expectations.

The organization's centralized contact center, staffed by 125 agents, managed admissions-related communications and customer service. Despite using Salesforce Service Cloud, Five9 telephony, Invoca for marketing attribution, and an EMR system, these tools were not optimized or fully integrated, leading to inefficiencies.

The business objective was clear: improve agent productivity and simplify the admissions process to help patients access addiction recovery services faster. Specific criteria guiding the transformation included:

- Delivering a **frictionless, best-in-class patient experience** for admissions, benefits verification, financing, and transportation scheduling.
- Providing an **intuitive, user-friendly experience** for agents, ensuring they had the necessary information at each step.
- Implementing **automated workflows and integrations to eliminate redundant data entry**.
- Building a platform that could **accommodate future growth** and services.
- Capturing data at each step to understand patient needs and **provide visibility into agent and business performance**.

SOLUTION

DecisivEdge approached the project with a structured, methodical process, leveraging its multidisciplinary expertise across Salesforce, contact centers, and data analytics. Over the course of 15 months, the team:

- Conducted an **8-week assessment** to confirm and document the transformation objectives, identifying technology and process deficiencies and proposing prioritized recommendations.
- Worked closely with the client to develop high-level cost-benefit analyses for each activity, presenting a detailed report for management approval.
- Delivered ongoing updates through weekly status reports and progress meetings, continually measuring business results and recommending enhancements.

DecisivEdge deployed a global team from the U.S., Canada, and India to ensure the transformation was executed efficiently while managing project expenses.

RESULTS

The transformation yielded remarkable outcomes:

- **\$2.8 million in annualized benefits** from agent efficiency initiatives.
- A **three-year ROI of 253%**.
- A **significant increase in average daily admissions despite a 40% reduction in contact center staff**.

ABOUT DECISIVEDGE

DecisivEdge leads organizations through their transformation journey. We believe that the right mix of people, processes, and technology will drive modernization, business optimization and automation. To learn more, please visit our website at www.decisivedge.com, email us at getresults@decisivedge.com or contact us at **302.299.1570**.